Distr.
LIMITED

IPCT. 3
15 October 1986

ORIGINAL: ENGLISH

UNITED NATIONS
INDUSTRIAL DEVELOPMENT ORGANIZATION

Regional Meeting for Africa,
in Preparation of the First Consultation
on the Fisheries Industry

Dakar, Senegal, 16-19 September 1986

REPORT*

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V.86-60899

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PREFACE

The System of Consultations

The Second General Conference of the United Nations Industrial Development Organization (UNIDO), held at Lima (Peru) in March 1975, recommended that UNIDO should include in its activities a system of continuous consultations between developed and developing countries with the aim of increasing the participation of the latter in world industrial production by means of enhanced international co-operation. Subsequently, the United Nations General Assembly, at its seventh special session in September 1975, supported this recommendation.

In May 1980 the Industrial Development Board decided to establish the System of Consultations on a permanent basis, and in May 1982 approved the rules thereof (The System of Consultations, PI/84), stipulating its principles, objectives and characteristics - in particular:

> "The System of Consultations shall be an instrument through which the United Nations Industrial Development Organization (UNIDO) is to serve as a forum for developed and developing countries in their contacts and consultations directed towards the industrialization of developing countries.
>
> The System of Consultations shall seek action-oriented measures towards increasing the share of developing countries in world industrial production and creating new industrial facilities in developing countries contributing to the establishment of a New International Economic Order. To that end, the problems associated with the industrialization of developing countries shall be considered on a continuing basis from a policy, economic, financial, social and technical point of view.
>
> The System of Consultations shall relate to co-operation between developed and developing countries and among developing countries themselves.
>
> The System of Consultations would also permit negotiations among interested parties at their request, at the same time as or after consultations.
>
> Participants of each member country should include officials of governments as well as representatives of industry, labour, consumer groups and others, as deemed appropriate by each Government.
>
> Each Consultation Meeting shall formulate a report, which shall include conclusions and recommendations agreed upon by consensus and also other significant views expressed during the discussions."

Consultations on the Fisheries Industry

At its nineteenth session in May 1985, the Industrial Development Board decided to include the First Consultation on the Fisheries Industry in the programme of consultation meetings for the biennium 1986-1987.

In accordance with this decision and the programme of work adopted, the First Consultation on the Fisheries Industry will be held in June 1987. The UNIDO Secretariat will convene a Global Preparatory Meeting to identify the priority points to be submitted to the First Consultation on the Fisheries Industry for its consideration.

In anticipation of the Global Preparatory Meeting, preparatory activities have begun at regional level, including:

- Preparation of documents on the fisheries industry in Africa, Asia and Latin America;

- Regional preparatory meetings for Africa and Latin America.

The Regional Meeting for Africa was organized by UNIDO in close co-operation with the United Nations Food and Agriculture Organization (FAO and the Government of France, and was hosted by the Government of Senegal. The meeting was held in Dakar (Senegal) on 16-19 September 1986.

The objectives of the meeting were:

(a) To examine the current situation of the fisheries industry in the region, and its possibilities of expansion within the Exclusive Economic Zone, established under the Convention on the Law of the Sea (1982);

(b) To identify the joint and individual constraints hindering the development of this industry in the developing countries in the region;

(c) To examine and propose forms of co-operation and international measures necessary to overcome the constraints identified;

(d) To select specific subjects for further study at the Global Preparatory Meeting and for possible inclusion among the subjects to be submitted to the First Consultation on the Fisheries Industry.

RECOMMENDATIONS

1. The Regional Meeting for Africa recognized the existence of serious constraints to the development of the fisheries industry in the frame of the Exclusive Economic Zone and the need to undertake measures to overcome them.

2. It recommended that the issues to be examined at the First Consultation on the Fisheries Industry should be the following:

A. Valorization of fish products, including:

(i) Small-scale processing;

(ii) Industrial processing;

(iii) Awareness and choice of adequate processing technologies;

(iv) The need to improve and disseminate preservation techniques, including low cost cold chains;

(v) Training of technicians in refrigeration, electronic and processing techniques.

B. Modernization of the fishing tools, including:

(i) Small-scale fishing boats;

(ii) Industrial fishing vessells;

(iii) Fishing gear and equipment;

(iv) Maintenance and ship repair facilities;

(v) Standardization and improvement of engines for small fishing boats.

3. The meeting also noted that special attention should be given by the national bodies and the international community to the systematic evaluation of resources in order to allow proper management.

4. It also drew the attention to the need to explore the possibilities of improving contractual arrangements with foreign partners on all aspects of the production, processing and marketing chain.

1. ORGANIZATION OF THE MEETING

5. The Regional Meeting for Africa in preparation of the First Consultation on the Fisheries Industry was held in Dakar (Senegal) on 16-19 September 1986. The meeting was attended by 18 participants from 14 countries in the region, two observers from developed countries, one observer from a developing country and representatives of the African Development Bank, FAO and UNIDO (the list of participants is given in Annex I).

Opening of the Meeting

6. At the opening session, the meeting was addressed by the Senegalese Secretary of State for Animal Resources, Mr. Mbaye Diouf, who welcomed the participants and highlighted the importance of the UNIDO System of Consultations as an instrument of raising the developing countries' share in world industrial output to increase international co-operation.

7. The Secretary of State also referred to the importance of the new situation created by the United Nations Convention on the Law of the Sea and the extended jurisdiction over the 200 nautical mile zone. In this respect, he referred to the need of African countries to develop their fisheries industry in order to ensure the adequate exploitation of the existing resources.

8. The Director of the System of Consultations, Mr. Gérard R. Latortue addressed the meeting on behalf of Mr. Domingo L. Siazon Jr., Director-General of the UNIDO, stressing the work undertaken by UNIDO in the frame of the System of Consultations, the importance of the fisheries sector for developing countries and the relevance of the discussions which were going to take place regarding the problems faced by the fisheries industry in the region.

II. SUMMARY OF DISCUSSIONS

9. Mr. Bernard Codou Dioh, Director of Oceanography and Maritime Fisheries of Senegal, was unanimously elected Chairman of the meeting. He presented the agenda which was adopted as set forth in Annex II.

10. A UNIDO official took the floor to explain the scope of the meeting, indicating that it was exclusively a meeting of experts in their personal capacity and that consequently their opinions would be binding neither on their agencies nor their Governments.

11. Mr. Jacques Weber, a UNIDO consultant, presented a document on the situation of the fisheries industry in Africa.

12. A UNIDO official then presented the document prepared by the UNIDO Secretariat, entitled "Main constraints on the development of the fisheries industry in Africa", and setting out to explain the present status of the fisheries industry in the region and its prospects in the context of the United Nations Convention on the Law of the Sea (1982), emphasizing the limitations affecting the development of the sector and the alternatives for an overall policy to develop fishing.

13. The FAO representative presented a paper on the follow-up to the FAO World Conference on Fisheries Management and Development.

14. Continuing with the agenda, the Chairman invited the participants to submit the reports relating to their countries. Each of the experts in turn summarized the fisheries situation in his country with reference to fisheries management, fishing fleet, port and handling infrastructure, processing, technology, domestic marketing and international trade.

15. The Chairman invited to consider the main topics included in the agenda, the conclusions of which are as follows:

16. Preamble - General conclusions

The participants recognized that in Africa there is in general a need and opportunity to improve systems contributing to change in the production of aquatic resources.

They stressed the need of getting assistance in reinforcing regional mechanisms of co-operation, namely at the political level. It was noted in general that countries which have developed such mechanisms are in a better position than those which did not develop them.

In particular, advantages can be derived from a close collaboration at regional levels in all research and development aspects including resources and technological innovations.

The participants highlighted the various scales of production, from the small-scale fisheries to the industrial fisheries and at the same time, it was recognized that under some circumstances this separation was not relevant and economically viable.

The participants therefore defined the fisheries industry as being all the human activities necessary to the development of fisheries resources.

17. Fisheries management

It was noted by the participants that about half of the catches are made by foreign fleets. They emphasized the need to make the best use of these catches either by African fleets or within the framework of joint ventures.

The participants noted that to plan fisheries development adequately, one should know what resources are available. It was therefore recognized that even though it may seem costly, fisheries research is a long-term profitable investment.

The participants emphasized the need to optimize and rationalize the present existing facilities and capacities at the different stages of the system, and noted the economic advantage of improving the complementarity between the different countries in Africa: capital, landing facilities, resources.

It was noted that most aquatic fisheries resources are fully exploited in Africa. Participants therefore emphasized that the objective to attain is to better valorize available resources, due respect being given to the reproduction capacities of these stocks.

Resources, landing facilities and domestic markets being unevenly distributed, participants highlighted the advantage of a regional approach encompassing the various aspects of maritime resources development.

The participants emphasized the need to reinforce the capacities for statistical follow-up of resources and catches, an essential condition for better exploitation of resources.

It was noted that today by-catches constitute an important share of catches and that the use of those by-catches should be a main concern to fisheries development in Africa.

18. Fleets

The participants emphasized that:

- Small scale fisheries landings are more important that those of national industrial fleets;
- Industrial fleets in Africa are generally old and often obsolete.

For industrial fisheries, it was noted that the very high cost and the lack of capital of vessels compelled African countries to purchase second hand vessels on international market, sometimes at the expense of competitiviness.

It was emphasized that technological choices should be relevant to target markets - very sophisticated technologies when the target is the world market - manpower-oriented technologies in the case of African regional markets. A pragmatic approach of technological choices was thus recommended.

The participants expressed the wish to see national fisheries extended to replace foreign fleets, due respect being given to the capacity of resources reproduction.

It was emphasized that fishing agreements and joint ventures were possible instruments for the desired national fleets extension.

The role of small-scale fisheries was highlighted. Their modernization was considered to be a priority.

19. Handling and harbour facilities

The uneven distribution of wharfs was highlighted, as well as the inexistence of infrastructures in some countries which, on the other hand, have important resources.

The participants recommended the joint use of maintenance and repair facilities in the various African regions.

They emphasized the need to optimize the use of existing facilities.

They also expressed the wish that countries' officials should meet before the First Consultation on the Fisheries Industry with a view to making a diagnosis of regional co-operation.

The participants further emphasized the need to improve and, if necessary, create more landing points for the small-scale fisheries on the coast and within the continent.

20. Processing

The participants noted the low level of use of industrial processing capacities available in Africa. They emphasized the need for regional co-operation to alleviate the uneven distribution of resources and processing capacities.

The participants recommended to optimize the use of existing facilities and re-habilitate them to take into account the new tendencies of the world market, namely prepared dishes, on-board processed products.

As regards small-scale fish processing, the role of women was highlighted.

The participants noted that the existing processing technologies were unsatisfactory. They recommended that attention be devoted to problems of insect infestation, packaging, storage and transportation.

They highlighted the importance of ice in the handling and transportation of these fisheries products from fishing points to processing areas.

They recommended that special attention be given to the training of small-scale processing as well as in the field of industry.

They stressed the economic importance of regular maintenance of equipment in the field of processing and for other fisheries-related activities.

21. Domestic marketing

There was agreement among the participants that fish product consumption should be increased and that measures to improve the marketing system are necessary.

Regarding intermediation, it was agreed that it served an important distribution function; however, it was considered that it would be highly desirable if the fish traders were organized and their profession regulated.

The problem of the distance of internal markets from the ports was referred to, as well as the need to develop an adequate marketing chain. Some participants explained the experience in their countries with the establishment of refrigeration chains. In some cases, these had not been successful, due to - among others - the high energy costs involved. It was suggested that experiences with low cost cold chains, i.e. insulated boxes, should be pursued.

22. International trade

It was noted in this regard that the low participation of Africa in the international trade of fish products was the reflection of the fact that more than 50 per cent of its catches were done by foreign fleets, and that the countries had no control over the marketing of these catches.

The importance of a regional market information system was recognized and it was urged that efforts undertaken in this regard should be continued.

The importance of intra-regional trade was highlighted and it was suggested that ways should be found to engage in intra-regional trade without intermediation.

The lack of unification of fish denominations was found to be a major obstacle to increase intra-regional trade, and efforts for a common nomenclature were found to be needed.

As a general conclusion, it was agreed that the region dit not get from international trade the share it deserved, given its resources.

23. The Chairman invited the participants to select the main issues to be presented at the Global Preparatory Meeting. After lengthy discussions, the recommendations were adopted as indicated above.

III. CLOSURE OF THE MEETING

24. The meeting was closed by the Secretary of State for Animal Resources, Mr. Mbaye Diouf.

25. The Chairman thanked the experts for their efforts in fulfilling the objectives of the meeting and indicated the appreciation for having been able to discuss the problems affecting the fisheries industry in the region and the unanimity in arriving at the recommendations for the Global Preparatory Meeting. On behalf of UNIDO, the Director of the UNIDO System of Consultations thanked the experts for their participation.

Annex I

LIST OF PARTICIPANTS

Benin

L. Fagbohoun, Directeur de l'Office béninois d'exploitation des produits d'élevage et de pêche (OBEPEP), B.P. 393, Cotonou.

Cameroon

Ndonga Celestin, Chargé d'études, Ministère du commerce et de l'industrie (Direction de l'industrie) et Président du Conseil d'administration de la Société Crevettes, Yaoundé.

Côte d'Ivoire

Ebri Attoli, Chef du Service de la pêche industrielle, Direction des pêches, Ministère du développement rural, B.P. V.19, Abidjan 01.

Gabon

Antoine-Roger Nkogho-Eyi, Chef du Service des pêches industrielles, Direction des pêches industrielles et cultures maritimes, B.P. 1128, Libreville.

Gambia (The)

A.O. Taylor-Thomas, Operations Manager, Seagull Coldstores Ltd., Banjul.

Ghana

M. Armah, Deputy Director, Fisheries Department, P.O. Box 630, Accra.

Madagascar

Robert Aimé Rabesalama, Chef, Division Gestion des activités de pêche industrielle, Ministère de la production animale (élevage, pêche) et des eaux et forêts, B.P. 1699, Antananarivo.

Guy Rabarison Andriamirado, Centre de recherches océanographiques de Nosy-Be, B.P. 68 - Nosy-Be.

Mali

Amadou Koné, Directeur de l'Opération pêche, B.P. 134, Mopti.

Morocco

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Niger

Anza Zakara, Directeur adjoint, Département des pêches et de la pisciculture, Ministère de l'hydraulique et de l'environnement, B.P. 721, Niamey.

Nigeria

N.O. Fadayomi, Chairman and Managing Director, FISECO Ltd., Fisheries Terminal Ijora, Box 7757, Lagos.

Senegal

Boubakar Diakité, Division Poissons, Institut de technologie alimentaire, B.P. 2765, Dakar.

Dr. Bernard Codou Dioh, Directeur de l'océanographie et des pêches maritimes, 1, rue Joris, B.P. 289, Dakar.

Moustapha Kébé, Centre de recherches océanographiques de Dakar-Thiaroye (CRODT), B.P. 2241, Dakar.

Saër Diene Seck, A.B.C., B.P. 2088, Dakar.

Sierra Leone

S.S. Deen, Secretary-General, Sierra Fishing Company, P.O. Box 1143, Freetown.

United Republic of Tanzania

S.S. Osman, Director of Fisheries, Ministry of Marine, Tourism and Forestry, P.O. Box 774, Zanzibar.

United Nations Agencies

United Nations Food and Agriculture Organization (FAO)

Iain J.B. Robertson, Senior Fishery Industry Officer, Office of the Director, Fishery Industries Division, Room F-328, Via delle Terme di Caracalla, 00100 Rome.

Intergovernmental organizations

African Development Bank

John Watten, Fisheries Officer, OARD/BAD, B.P. V.316, Abidjan 01, Côte d'Ivoire.

Consultant

Jacques Weber, Directeur du Département Stratégies de développement et d'aménagement, Institut français de recherche pour l'exploitation de la mer (Ifremer), 66, avenue d'Iéna, 75116 Paris, France.

Observers

France

Philippe Poitet, Secrétaire général du Comité interministériel pour l'alimentation et l'agriculture, 30, rue Las Cases, 75007 Paris.

Mexico

Lic. Alonso-Lopez-Cruz, Director General de Asuntos Pesqueros Internacionales, Secretaría de Pesca, Av. Alvaro Obregon 269, 8th Floor, Mexico 7 D.F.

Poland

Ireneusz Wrzesniewski, Vice-Director of International Co-operation Department, Ministry of Maritime Economy, Warsaw, ul. Hoza 20.

Annex II

AGENDA

1. Opening of the meeting

2. Election of Chairman and adoption of the Agenda

3. Presentation of Secretariat Paper on the situation on the Fisheries Industry in the Region

4. Follow-up to the FAO World Conference on Fisheries Management and Development

5. Brief presentation of country papers by participants

6. Consideration of main topics

   (i) Fisheries management

   (ii) Fishing fleet

   (iii) Port and handling infrastructure

   (iv) Processing

   (v) Technology

   (vi) Domestic marketing

   (vii) International trade

7. Selection of main issues to be presented at the Global Preparatory Meeting

8. Consideration and adoption of the report of the meeting

Annex III

LIST OF DOCUMENTS

Main constraints on the development of the fisheries industry in Africa, by UNIDO Secretariat

The fisheries sector in the countries of Africa, by Jacques Weber and Henri Durand

Follow-up to the FAO World Conference on fisheries management and development, by FAO

Situation de la pêche au Bénin, by L. Fabgohoun

Pêches industrielles en Côte d'Ivoire, by Ebri Attoli

L'industrie de la pêche au Gabon, perspectives de développement et obstacles à ce développement, by Antoine-Roger Nkogho Eyi

Review of the fisheries industry - Gambia, by A. Olu Taylor-Thomas

Notes on Ghana fishing industry, by M. Armah

Situation de la pêche au Mali, by Amadou Kone

Situation de la pêche au Maroc, by Rachid Biaz

The status of the fisheries industry in Nigeria, by N.O. Fadayomi

Etude de cas sur les pêches industrielles du Sénégal, by Dr. Bernard Codou Dioh

State of the fisheries of Sierra Leone: its potential and constraints for industrialization, by Sanusi S. Deen

The Mexican fishing industry, by Alonso López Cruz

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